

## Module 6

### Chapter 2

## Updating Pay, Benefits, and Entitlements Data

### Chapter Overview

#### Introduction

This chapter shows you how to manage PB&E data.

- You must use the RPA to update benefits that require the production of a NPA, such as:
  - Federal Group Life Insurance (FEGLI).
  - Retirement plan information (CSRS, FERS).
  - TSP.
- You can update PB&E data through the **People** window **¶** **<Assignment>** for benefits that do not require an RPA, such as:
  - Health Insurance.
  - Government Awards.

#### Chapter Contents

Topic	Page
Processing a Change in FEGLI (Using the RPA)	3
Accessing the RPA and Completing the FEGLI Change	3
Processing a Living Benefits Election	4
Accessing the RPA and Completing the Living Benefits Election	4
Initiating or Updating a PB&E Element (Without an RPA)	6
Initiating a New Element	6
Updating an Element	8

## Chapter Overview, Continued

---

**Who Does It?**

You must be in the role of Personnelist.

---

**Before You Begin**


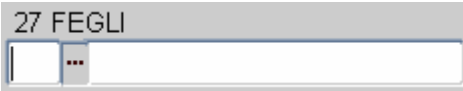

- PB&E is initialized upon an appointment action. Some elements, such as life insurance and TSP have a waiting period before the elements can be updated or an initial entry made.
  - To enter an element for an employee:
    - If necessary, change the effective date to the correct date for making the element entry by DateTracking.
    - If the pay period is closed at the effective date, you cannot make any non-recurring entries of elements that process in payroll runs.
  - Use the **Element Entries** window to make and review manual entries to input values for individual employees.
    - If the element you need to add or change is not found in the **Elements Entries** window, you can select it from the **Elements LOV**.
-

## Processing a Change in FEGLI (Using the RPA)

### Purpose

This procedure guides you through the steps for updating the PB&E area in an employee's record using the RPA. The example is for a Change in FEGLI.

### Accessing and Completing the FEGLI Change

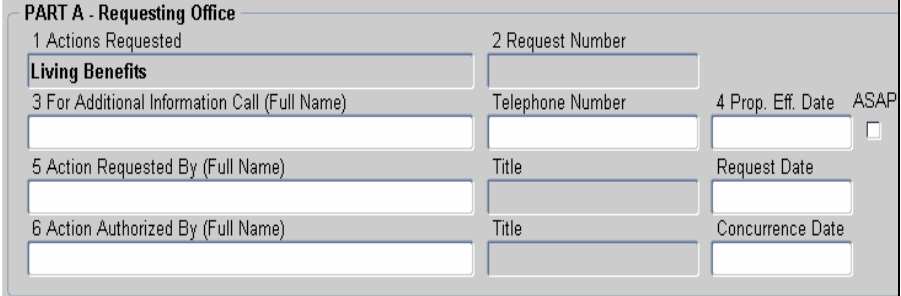
Step	Action
1	<b>Navigation Path</b> □ <i>Request for Personnel Action</i> □ <i>Change Actions</i> □ <i>Change in FEGLI</i> □ <b>&lt;Open&gt;</b>
2	The RPA displays the <b>Change in FEGLI</b> populated in <b>PART A – Requesting Office</b> . The <b>Action Requested</b> , <b>Nature of Action Code</b> , and <b>Legal Authority</b> populated with the NOA Code and clear text. Complete the following data fields: 
3	Click <b>&lt;Employee and Position Data&gt;</b> tab at the top of the RPA to advance. No information is needed on the Position Data page.
4	With your cursor in the <b>FEGLI</b> data field, click the LOV icon to select the information needed. Click the <b>&lt;OK&gt;</b> button. 
5	Click <b>&lt;Remarks and Address&gt;</b> tab to advance to Page 4. With your cursor in <b>Part F, Remarks</b> , click the LOV icon to select the appropriate remark then click the <b>&lt;OK&gt;</b> button. Repeat the procedure if more remarks are needed. 
6	Click <b>Save</b> icon and route the request as required by Component business rules.

*Continued on next page*

# Processing a Living Benefits Election

**Purpose** This procedure illustrates how to process full or partial Living Benefits Election by an employee.

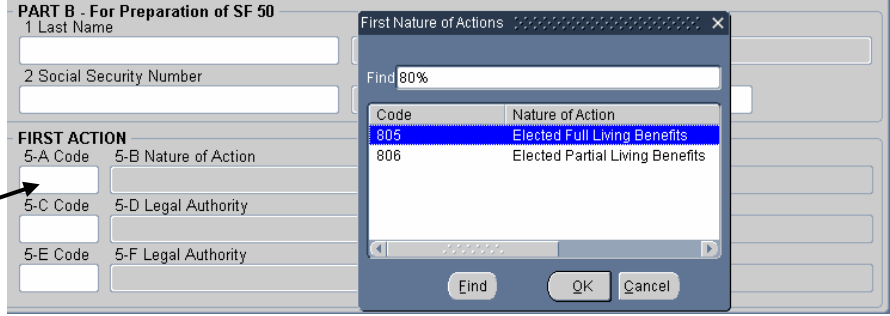


## Accessing the RPA and Completing the Living Benefits Election

Step	Action
1	<b>Navigation Path</b> <b>Request for Personnel Action</b> <b>Living Benefits</b> <b>&lt;Open&gt;</b> .
2	<p>The RPA displays the <b>Living Benefits</b> populated in <b>PART A – Requesting Office</b>. Complete the other data fields as required.</p> 
3	With your cursor in the blank data fields of <b>Part A - Requesting Office</b> Region, use the LOV and make appropriate selections. Then click the <b>&lt;OK&gt;</b> button. Or type in the information.
4	With your cursor in <b>Part B – For Preparation of SF-50</b> Region, retrieve the employee's information by typing in either the last name or social security number to automatically populate the data fields. You can also use the LOV on the Toolbar.
5	<p>In the <b>Effective Date</b> data field, enter an effective date for the Living Benefits election.</p> <ul style="list-style-type: none"> <li>Type in a date using the format: DD-MMM-YYYY.</li> </ul> <p style="text-align: center;"><i>Or</i></p> <ul style="list-style-type: none"> <li>Click the LOV to display the calendar to select and enter a date.</li> </ul>

*Continued on next page*

## Processing a Living Benefits Election, Continued

### Completing the Living Benefits Election


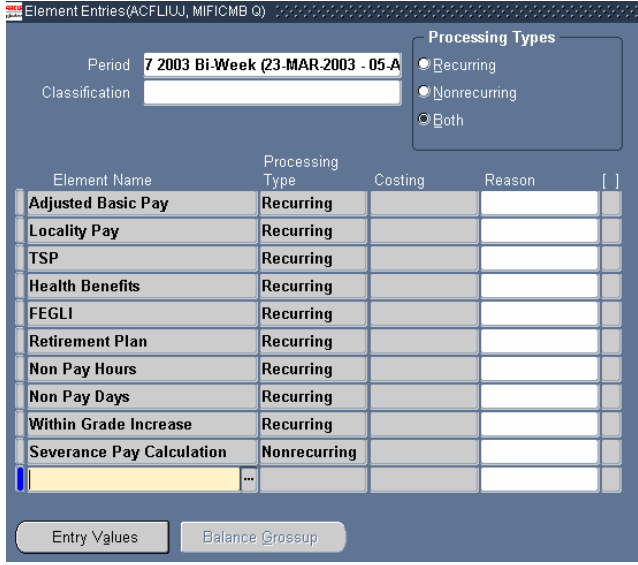
Step	Action
6	<p>Click in the <b>5-A Code</b> data field then click the LOV icon. To display the <b>First Nature of Action</b> codes Select a code then click the &lt;OK&gt; button.</p>  <p>The corresponding <i>Nature of Action</i> and <i>Legal Authority</i> data fields display in the appropriate data fields.</p>
7	<p>Click &lt;Remarks and Address&gt; tab to access <b>Part F – Remarks for SF-50 Region</b>, click in the <b>Code</b> data field, then click the LOV icon to display a list of FEGLI related remarks. Select the appropriate remark and click the &lt;OK&gt; button.</p>  <p>To add additional remarks, click the next <b>Code</b> data field and repeat the procedure. If there are more than four remarks, click the last <b>Code</b> data field and click the down arrow on your keyboard to insert additional remarks.</p>
8	<p>Insert any data required to complete a remark (indicated by a blank, underlined space).</p> <p><b>Note:</b> Do not include a period at the end of the inserted data, the system populates the data with a period. If you do include the period, it will result in two periods on the NPA when it is printed.</p>
9	<p>Click Save and route the request as required by Component business rules.</p> <p> <b>Note:</b> There is no change to the <i>FEGLI</i> data field on the <b>Employee and Position Data</b> tab</p>

# Initiating or Updating a PB&E Element (Without an RPA)

## Purpose

This procedure illustrates how to initiate a new data element (for example, Living Quarters Allowance), or update an element when a NPA is **not** required.

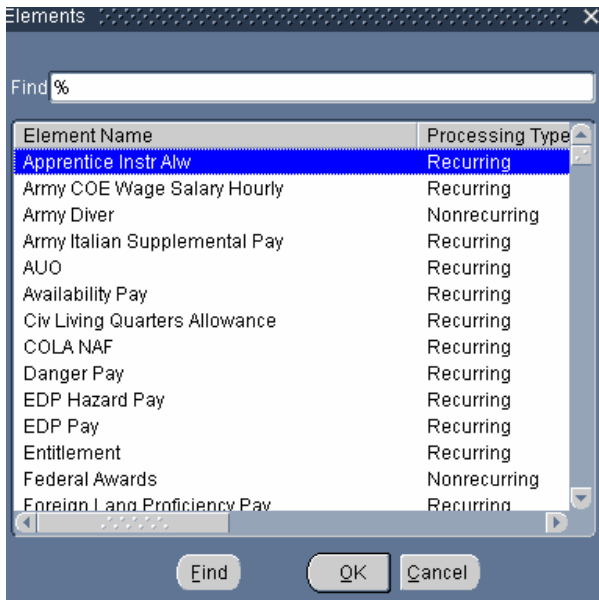
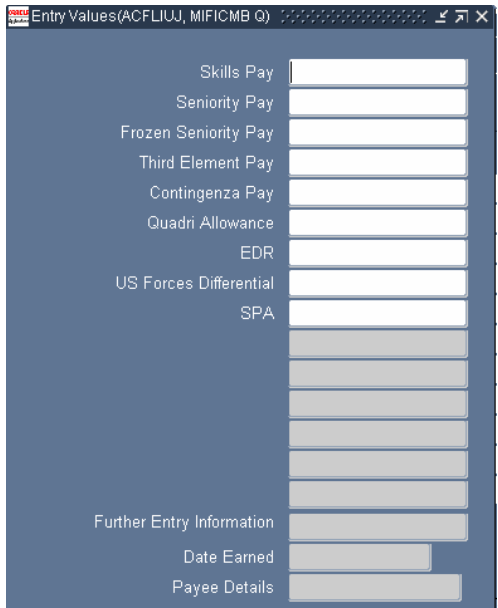
## Initiating a New Element

Step	Action
1	<b>Navigation Path</b> <b>Π People Π Enter and Maintain Π &lt;Open&gt;</b> .
2	The <b>Find Person</b> window opens. Type in the employee's name or social security number the click the <b>&lt;Find&gt;</b> button.
3	The <b>People</b> window opens If the effective date of the data change is not the current date, click Alter Effective Date  on the Toolbar and enter new effective date.
4	Click the <b>&lt;Assignment&gt;</b> button.
5	Click the <b>&lt;Entries&gt;</b> button.
6	If no data displays in the <i>Element Name</i> data fields then: <ul style="list-style-type: none"> <li>Click in the first <i>Element Name</i> data field.</li> <li>Press the <b>F11 / Ctrl +F11</b> button</li> </ul> If data displays in the <i>Element Name</i> data fields, go to step 7.
7	Select the first blank <i>Element Name</i> data field.  <p><b>Note:</b> If there are no blank fields, "arrow" down until a blank field displays.</p>

*Continued on next page*

# Initiating or Updating a PB&E Element (Without an RPA), Continued

## Initiating a New Element (continued)

Step	Action
8	<p>Click the LOV icon to select the appropriate item, then click the <b>&lt;OK&gt;</b> button.</p> 
9	<p>Click the <b>&lt;Entry Values&gt;</b> button. Complete the data fields then click the <b>&lt;OK&gt;</b> button.</p> 

*Continued on next page*

# Initiating or Updating a PB&E Element (Without an RPA),

Continued

## Initiating a New Element (continued)

Step	Action
10	Click <b>Save</b> icon and exit the windows.
11	If the effective date was altered, click the <b>Alter Effective Date</b> button on the Toolbar then click the <b>&lt;Reset&gt;</b> button on the <b>Alter Effective Date</b> window to return to the current date.

## Updating an Element

Step	Action
1	Follow steps 1-6 of <b>Initiating a New Data Element</b> in this chapter.
2	Select the appropriate <b>Element Name</b>
3	Click the <b>&lt;Entry Values&gt;</b> button.
4	Click in the data field you need to change.
5	Click the LOV icon to select the new item then click the <b>&lt;OK&gt;</b> button.
6	<p>If you are changing existing data, an <b>Option</b> window will appear asking Update or Correction.</p> <ul style="list-style-type: none"> <li>• Select <b>&lt;Update&gt;</b> to change the record as of the effective date you specify. When you update a record all previous information is preserved and can be viewed in history.</li> <li>• Select <b>&lt;Correction&gt;</b> if the previous data was incorrect. The new information will override the previous information back to the date the error occurred.</li> </ul>
6	<p>Click <b>Save</b> icon and exit the window.</p> <p>The Message Line will indicate that the transaction is complete and has been applied and saved.</p>
7	If the effective date was altered, click the <b>Alter Effective Date</b> button on the Toolbar then click the <b>&lt;Reset&gt;</b> button to return to the current date.